




# Maricopa County

Office of Management and Budget

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Date: February 10, 2006

To: Assistant County Managers, Department Directors, Elected Officials, Judicial Branch Officers, Strategic Coordinators and Budget Liaisons

From: Sandi Wilson,   
Deputy County Manager

Subject: Managing for Results (MFR) Memo #3: Strategic Planning and Budgeting Guidelines

As you know, the County's budgeting and strategic planning processes have been integrated through Managing for Results, and, in the past two years, a more established approach for updating departmental strategic plans has been introduced. The budget is now tied to the goals, activities and measures in departmental plans, and these activities and measures are now entered into Cognos for budget preparation and development. For these reasons, it has become critical to ensure that changes to departmental plans do not occur during budget development, unless such changes arise due to Results Initiative Requests (RIRs) or the budget development analysis process itself.

Optimally, we are moving towards a planning and budgeting framework where plan changes and updates for the next budget year are completed each fall as a basis for the budget submissions due the following January. I have asked Tom Brandt, our Managing for Results Coordinator, to develop updated planning guidance to more thoroughly document and communicate this approach. In the interim, please note the following guidelines regarding updates to departmental strategic plans.

## FY 2007 Departmental Strategic Plans

- Per the instructions in the Managing for Results Memo # 1 issued last July 15, 2005, strategic plan updates for FY 2007 were to be submitted to OMB by September 30, 2005. OMB worked with departments that submitted plan updates and approved almost all plan updates as of December 30, 2005.
- At this point, no further changes will be made to FY 2007 departmental strategic plans (e.g., goals, activities, measures) now that budget development is underway, unless those changes are initiated as a result of a Results Initiative Request (RIR) or as part of

the budget development analysis process. In those cases, the OMB budget analyst will work closely with the department to make any of the necessary changes.

FY 2008 Departmental Strategic Plans

- Any other work getting underway now to refine or update departmental strategic plans (e.g., mission, vision, goals, programs, activities, measures) will be for FY 2008 and will need to be submitted by September 29, 2006.
- If departments are planning to update the strategic elements of their plans (mission, vision, goals or issue statements), please contact the MFR Team for assistance. The MFR Team will coordinate with the OMB budget staff on strategic updates to departmental plans.
- If departments are planning to update the structural elements of their plans (programs, activities, measures), please contact your respective OMB analyst for assistance after May 1<sup>st</sup>, at which time most of the FY 2007 budget development should be completed. At the request of the OMB budget analyst, the MFR team may provide additional assistance to a department updating their structural elements.

Should you have any questions about this guidance, please contact Deputy Budget Directors Brian Hushek, 506-6338, or Chris Bradley, 506-4960. Additional information about the FY 2008 planning and budgeting process will be forthcoming from Tom Brandt.